



USER'S GUIDE FOR FILERS

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Introduction

The eFiling system is designed to make the work associated with initiating and processing a case more efficient and convenient for both filers and court personnel. Not only does the Interface allow filers to submit their documents to the court electronically, it also provides means for them to view case histories, check the status of their submissions, send follow up documents and access service lists.

The Login page allows users to **Request an Account**, **Login to the system using their Username and Password** once the account request has been approved, use the **Forgot your Password** and **Forgot Your User Name** links to reset forgotten login credentials, read **informational posts** from the system administrator, and be **directed to informational pages** by clicking the provided links at the bottom of the screen.

How to Section

The How-To Section gives concise steps to complete a task. For greater detail with accompanying images, refer to the **Navigating the Filer Interface Section** (see pg. 12). Corresponding page numbers will be given.

How to Request an Account

1. Click the button **Request Account** on the **Login** page.
2. Read the **User Agreement**. Select the **radio button** at the bottom of the page that agrees to the contract. Click the **Submit** button.
3. Choose the applicable **User Role** and click **Next**.
4. On the **Select an Organization Page before**, scroll through the **Existing** field drop-down menu to select the appropriate organization. (This field is a type-ahead field which allows you to begin typing and the system will match and bring up the organization most closely related to it. Click the down arrow and use the gray scroll bar to narrow down your search.) If the organization is not listed, click the radio button **New** and type the name in the provided field. Click **Next**.
5. On the **Request a User Account Page**, create a user profile by entering the requested information in the provided fields. Fields marked with an asterisk* are required. Click **Submit**.
7. **Login** is available *after* you have received notification that the account request has been approved.

How to Handle a forgotten username or password

Forgot Password

1. If you have forgotten your password, click **Forgot Your Password** on the **Filer Interface login page**. The *Request Password Reset* page will appear.
2. Enter your username and click **Submit**.

3. An email containing a link will be sent to the account listed on your user profile. Upon clicking the link, you will be directed to a page with a temporary password that you may use to login to the eFlex system.
4. After login, hover over the **My Profile Tab** and select **Change Password** from the dropdown menu.
5. Enter the temporary password in the **Password field**.
6. Create a new password following the password requirements and type it into the **New Password field**. Be sure that the password you select is one you will remember, contains eight characters, including a special character (such as an exclamation point, asterisk, or period), and is different from your username.
7. In the **Confirm New Password field**, re-type the password exactly as you entered it in step 6.
8. Click **Submit** to save your changes.
9. Notify any individuals who may enter filings for you of the changes to your login credentials.

Forgot Username

If you have forgotten your username, click **Forgot Your User Name** on the **Login page**. A page will appear asking you to enter the *primary email address* associated with your account.

1. Fill in your primary email address, and click **Submit**.
2. Check your email account for a message sent from the eFlex system. It will contain your username.

How to Prepare documents prior to efilng.

Documents must be submitted in a system-accepted file format. Failure to do so will generate an error message.

- All documents need to be submitted in a **PDF format**. This also applies to exhibits such as copies of contracts, copies of cancelled checks, etc. Scan and save these items as a PDF instead of jpg or jpeg.
- Individual document size is limited to **10 MB**. Multiple documents can be included in a single submission. The size limitation for an entire submission is **30 MB**.
- To keep the file size down when scanning, use the black and white setting rather than color (unless the loss of the color degrades the value of the evidence.) Color increases the size of a file. Another option to reduce file size is to reduce the dpi (dots per square inch) as long as the resolution is high enough to make the document readable.

How to File a New Case (see pg. 12 for greater detail & screenshots)

1. On the **Home Page**:
 - a. Click the **New Case** button. Alternately, hover over the **eFile Tab** and select **New Case** from the drop-down selections.
 - i. Click the appropriate **Case Type** and you will be directed to the next page.
2. On the **Case Initiation page**:

- a) Click the **Add My Parties button** to be directed to the **Add a Party Page**.

4. On the **Add a Party page**:

- a) Select the appropriate radio button for **Organization** or **Person**.
- b) Enter information in the **provided fields**. Fields with an asterisk* are required to proceed to the next page. You may opt to select an organization from the field **Pre-Existing Org**. This will auto-populate the fields with the system-recorded information.
- c) For a case initiation, it is unnecessary to fill out the section **Add Representation for this Party** because the filing attorney will automatically be added as the attorney on the case.
- d) If appropriate, click the **Add button** under the sections **Add Aliases (AKA)**, **Add Additional Addresses**, and/or **Add Additional Phones**. In the pop-up boxes, fill out the requested information and click **Save**.
- e) Click **Next** at the bottom of the page to save your information. This will return you to the **Case Initiation page**.

5. On the **Case Initiation page**:

- a) To add additional plaintiffs, click the **Add My Parties button** again and repeat the listed steps above.
- b) Click the **Add Other Parties button**.
- c) Create the profile following the steps outlined above.
- f) If the opposing attorney information is known, click the **Add button** under the **Add an Attorney for this Party** section.
- g) Choose to fill in either the attorney's last name, the bar number, or the organization. Click the **Search button** to see if this individual is recorded in the system.
- h) The system will display possible matches, especially if an organization field has an entry. Mark the checkbox on the left next to the correct attorney. This will enable the **SAVE button** to be clicked. **Click** to proceed.
- i) If there is not a match in the system, a red text message will appear that "No attorney is found." One may opt to skip the **Add an Attorney for this Party** section of the page, or choose to click the **Clear button** and proceed by clicking the **Add New Attorney button**.
- j) If you click the **Add New Attorney button**, the **Add/Edit New Attorney Details pop-up box** will appear. Fill in the fields with known information. Be aware of the required fields that have an asterisk*. Click the **Save button** at the bottom.
- k) Click the **Next button** at the bottom of the page to continue with the case initiation.
- l) View the case participants listed on the **Case Initiation page**. Click **X** to remove them. If edits are needed, click the case party's name and the system will direct you to the **Edit Party page**.
- m) Click **Next** to return to the **Case Initiation page**. Click **Next** again to proceed.

6. On the **Add a Document Page**:

- a) **Document Type field** - Select the appropriate document type from the drop-down menu.

- b) **Additional Text field** - If desired, enter text in this *optional field* to give greater detail to the description of document type. This text will ultimately display as part of the document listing in the official **Case Summary**.
- c) Mark the **Sealed** or **Confidential** checkboxes if appropriate.
- d) **Page Count** - Enter the number of pages of the document.
- e) **Document Location** – Click the **Browse button** to locate and select the document from your computer. When the *title of the document* displays next to the **Browse button**, click the **Add button** to upload the selected document to the filing. (Each document uploaded to the system must be 10 megabytes or less. Multiple documents can be included in a single submission. The size limitation for an entire submission is **30 MB**.)
- f) Add subsequent documents one at a time following the above steps.
- g) If you choose to finish the submission at a later time, click the **Move to Draft Button** at the bottom of the page. All data will be saved. (To retrieve the **Draft** later, hover over the **eFile tab** and select **Draft Filings**. To proceed from this point, click the *hyperlink* document type **Description**.)
- h) Click **Next** at the bottom of the page to proceed with the filing once all documents have been added.

7. On the **Review and Submit Filing Page**:

The filer may view, edit, add/or remove documents, go back to a previous page in the case initiation, cancel the filing, move the filing to the Draft page to act on it at a later time, or submit the filing to the court.

- a) **The Client #** - This optional field is listed only as a convenience to the filer who may have an internal office filing system to identify their clients. This number can be used to filter data on the **My Filings page** or the **Draft Filings page**.
- b) The **Change Case Data button** enables the filer to return to the **Case Initiation page** to view and/or edit case participant information.
- c) The **Add/Remove documents button** enables the filer to return to the **Add a Document page** to make any changes.
- d) Use the optional **Special Filing Instructions field** if you choose to make comments to the court. Any comments made will be *unofficial* and will not be recorded in the official **Case Summary**.
- e) Click the button **Submit the Filing**. You may also choose to select **Back, Cancel (Delete)** or **Move to Draft** as needed.

NOTE: When you initiate a new case as a case participant, the case number will automatically be added to your “Cases” list. These may be view by hovering over the **Cases Tab** in the menu bar and selecting **Cases** from the drop-down list. The **Cases data table** is a useful resource to easily find case-relevant information.

How to File to an Existing Case (see pg. 17 for greater detail & screenshots)

1. On the **Home Page**, click the **Existing Cases** button. Alternately, hover over the **eFile Tab** on the **Menu Bar** and select **Existing Case** from the drop-down list.
2. The top portion of the **Cases page** displays a **Case Number text field**. Enter a case number and click on the **eFile button** to its right. Alternately, locate the case in the **Case Data Table** at the bottom of the page and click the **eFile hyperlink** on its line. The user will be directed to the **Add-a-Document page** to proceed with the filing.
3. Follow **steps 6 and 7** listed above in the section **How to File a New Case** for the **Add a Document page** and the **Review and Approve Filing page**.

How to Check the Filing Status of a Submission (see pg. 23 for greater detail & screenshots)

On the **Home Page**, click the **My Filings button** to be directed to the **My Filings page**. Alternately, hover over the **eFile Tab** on the **Menu Bar** and select **My Filings** from the drop-down list.

1. Use the **filtering fields** at the top of the page to narrow your search and alter the information displayed in the **data table** at the bottom of the page. Click **Go** to initiate the search.
2. View the **Status column** on the right. It will display the current status of the filing within the system. The final state is **Filed**.

Other statuses include:

- **Received** - The submission has received a time stamp and will be placed in a queue for further processing.
- **Awaiting Approval** - The submission is in a queue for further processing.
- **Receipt Pending** - An error occurred in communications. Call the e-Filing administrator.
- **Rejected** - Submission was denied. See the note from the clerk for an explanation. To start the resubmission process, click **Resubmit**.
- **Filed** – The final status of the filing. No further action. The filer should look at their case history or receipt of the submission to download signed documents and check for notes from the Clerk.
- **Accepted-Presented to Judge** –Accepted and routed to a Judicial Queue for a judge to review. This means that even though the submission has been filed, the proposed document may not have been reviewed at this time, but it has been presented to a judge.
- **Resubmitted** - This submission was “Rejected,” and the filer used the old submission to create a new submission. The status of this submission has no future value, and the filer needs to look at the new submission status.

How to Access the Confirmation of Receipt and Court-stamped Documents (pg. 26)

The **Filing Status Page** allows you to access documents that were filed with your case for either viewing or printing purposes.

1. On the **My Filings page**, click the submission’s **hyperlink status** inside the **Status Column**.

2. The Documents, as filed in the original submission, will display in the section with the column headings **Document Name** and **View Document**. These documents *do not* have the court's time and date stamp.
3. Below the horizontal line is the **Response section**, meaning the documents after they have been processed and returned by the court. This section displays the documents with the court's time and date stamp on them. When applicable to the document type, it will also have the court's electronic signature.
4. The **Confirmation of Receipt** is the Court's official notification that the submission was received. Click the *hyperlink* **receipt.html** to display the **Receipt**. It is recommended that you print or save a copy for your records because documents are routinely removed from the Filer Interface after a set number of days/months as directed by the court. (That standard time is 90 days.)

How to Resubmit a Rejected Filing (see pg. 27 for greater detail & screenshots)

If the clerk rejects a filing, they are instructed to enter a note for the filer to explain the reason why. With these instructions, the filer can correct the filing and resubmit it. The system flags the filer of the note using an *exclamation point inside a yellow rectangle*.

1. On the **My Filings page**, click the submission's *hyperlink status* **Rejected** inside the **Status Column** to be directed to the **Filing Status page** where you may read the REASON for the rejection. Click the **back button** to return to the **My Filings page**.
2. Click the **Resubmit** button, which is displayed to the right of the status column. This is generated as a "one-time-use" and will cause the eFlex system to *clone the information* from the rejected submission and route the user to the **Add a Document page** where the user can make the necessary corrections to the filing and proceed to resubmit the filing back to the court.
2. After the corrections have been made on the **Add a Document page**, click **Next**.
3. On the **Review and Approve Filing page** click **Submit**.
4. The **Filing Status page** will now display a **Resubmitted status** for the first filing and will create a new data line for the resubmitted filing.

How to View Notifications (see pg. 29 for greater detail & screenshots)

On the **Home Page**, click the **Notifications Button** to be directed to the **Notifications page**. Alternately, hover over the **Cases Tab** on the **Menu Bar** and select **Notifications** from the drop-down list. If there is a number in parentheses next to the **Notifications** button on the **Home page**, this indicates how many "unread" notifications currently exist. This page is where the filer may read the "*official*" notifications from the court.

1. If desired, use the two **Search By fields** at the top of the page to filter the display of information in the **Notifications Data Table**. Click **Go** to *initiate a Search*.
2. Notifications that *have not* been read will have a bolded heading in the **Document(s) filed by** column and a closed envelope to the left of the **Notification ID**.

3. Clicking the **hyperlink Document Title** will open a new browser tab to display the *official* NEF, or *Notice of Electronic Filing*.
 - a) The top of the NEF contains case-related information, including **document(s)** filed.
 - b) The bottom portion of the NEF indicates the **service requirements** at the time the listed document was submitted. (Future or past submissions may have different service requirements.)
 - c) Persons with eFiling accounts being served electronically are listed first on the NEF.
 - d) Persons still requiring service by traditional means are listed under the second heading.
4. Back on the **Notifications page**, the *filed documents* in the submission will be listed underneath the bolded title of the NEF. To open and view them, click the **hyperlink document title**.

NOTE: The eFlex system also sends **courtesy email notifications**, to communicate with the eFiling account user when filings are submitted on their cases. All email addresses entered in their profile will receive the email messages. There are 3 types of email notifications sent:

- **Received Notice** – This states that the submission was *received* by the court.
- **Accepted Notice** – This states that the submission was *accepted*, or approved and recorded by the court.
- **Courtesy NEF** – The “NEF,” which means *Notice of Electronic Filing*, identifies document(s) that were filed to the court and which case participants received electronic notification through the eFiling system and which participants need to be served in the traditional manner. Addresses for the latter are included for mailing purposes.

NOTE: Email notifications are considered **courtesy notifications** only and not **official notifications** because emails can be lost; they can get blocked by spam, or you may not receive them based on issues with your email server. These circumstances are out of the control of the eFiling system. For this purpose, the *official notifications* come through the **Filer Interface**. These notifications can be tracked by the clerk to ensure that everyone has been served electronically.

NOTE: Once you have efiled on a case and have been added as a party to that case by the clerk of court, your username will be associated with that case. When someone else sends a follow-up submission on any case on which you have been indexed as a participant, you will receive a *courtesy email* of this action and an *official notification* on your **Notification page**.

NOTE: For participants on the case that *do not* have an eFiling account, it is required of the eFiling user to continue the practice of service to those participants via paper and to include the **Certificate of Service** as part of the documents in the filings.

How to File a Notice of Appearance – for Attorneys (see pg. 20 for greater detail & screenshots)

1. When an attorney files a case initiation, the system will automatically add them to the case as Counsel of Record and they will be able to access all case records (other than sealed documents), receive notifications of activity on the case, and view all filed documents to the case.

NOTE: When an attorney is counsel for the opposing party, after uploading their **Answer** document on the **Add a Document Page**, the system will direct them to a page where they identify the party for whom they are filing and will be representing by marking the checkbox next to their name. Click the

Next button to proceed. (This will associate the attorney electronically to the case so they will be able to access all case records (other than sealed documents), receive notifications of activity on the case, and view all filed documents to the case.)

2. To file the document type **Notice of Appearance**, there are 2 options the filer may choose - one with a document or one without a document. Either option will direct the filer to the page where they mark the checkbox next to the name of the person they will be representing.
3. Back on the **Add a Document page**, add additional documents as needed to complete the submission.
4. Click **Next** button at the bottom of the page to proceed once all documents have been added.
8. On the **Review and Submit Filing Page**:

The filer may view, edit, add/or remove documents, go back to a previous page in the case initiation, cancel the filing, move the filing to the Draft page to act on it at a later time, or submit the filing to the court.

- a) **The Client #** - This optional field is listed only as a convenience to the filer who may have an internal office filing system to identify their clients. This number can be used to filter data on the **My Filings page** or the **Draft Filings page**.
- b) The **Change Case Data button** enables the filer to return to the **Case Initiation page** to view and/or edit case participant information.
- c) The **Add/Remove documents button** enables the filer to return to the **Add a Document page** to make any changes.
- d) Use the optional **Special Filing Instructions field** if you choose to make comments to the court. Any comments made will be *unofficial* and will not be recorded in the official **Case Summary**.
- e) Click the button **Submit the Filing**. You may also choose to select **Back, Cancel (Delete)** or **Move to Draft** as needed.

How to Access Case Information (see pg. 17 for greater detail & screenshots)

On the **Home Page**, click the **Existing Cases** button. Alternately, hover over the **eFile Tab** on the **Menu Bar** and select **Existing Case** from the drop-down list. This directs the user to the **Cases Page**.

- The data in each column has an ascending/descending sort feature that sorts alphabetically or numerically. Click the **column header** of choice to cause the table display to be organized according to the header selected. Clicking the column header a second time reverses the order of the displayed information.
- Clicking the **+sign** next to any listing in the **Case Title column** will *expand* the section and display the case documents. Clicking the **hyperlink Document Title** will open the document for viewing, printing, or saving. Clicking the **– sign** will *collapse* the section.
- Clicking the **hyperlink case number** in the **Case Number column** on the line of the intended case, will open a new browser tab and display the **Case History**, which includes case participant information as well as links to open, view, and print court-stamped documents in their final state as they are recorded permanently in the CMS (case management system).

How to complete a Draft Filing (see pg. 28 for greater detail & screenshots)

On the **Home Page**, click the **Draft Filings** button or hover over the **eFile Tab** on the **Menu Bar** and select **Draft Filings** from the drop-down list. If there is a number in parentheses next to the **Draft Filings** button on the **Home page**, this indicates how many incomplete filings have yet to be submitted to the court.

1. On the **Draft Filings** page, all outstanding incomplete filings will display in a data table.
2. To proceed, click the *hyperlink Description* on the line of the filing you intend to complete. This will direct you to the **Add a Document** page. Add documents, if applicable, and click **Next** to be directed to the **Review and Approve Filing** page. Click the button **Submit the Filing** to complete the process and submit the filing to the court.

Navigating the Interface

THE HOME PAGE

The **Home page** of the **Filer Interface** is the first screen upon login. The **Home Buttons** provide quick access links to take the user to the screens most often visited. The user may also navigate the interface using the **Menu Bar** which is conveniently located across the top of every page. Hover over each tab to display page options available for the filer. Many of these menu items are replicated as a **Home button**.

- Any number in parentheses next to the **Buttons** indicates the number that has yet to be acted upon by the filer.
- The **username** appears in the upper right corner of the screen, based on the user's profile information.
- For best results, users are strongly encouraged to use only the navigation buttons that are displayed on the eFiling interface, rather than using the internet browser back arrow. These navigation buttons will appear at the bottom of each page and will give the user options such as a **Back** or **Next**.
- Another navigation tool is the **breadcrumb trail** displayed at the top of every page, just under the **menu bar**. The active links show the pages the user has visited to get to the current page. Clicking any of these links will take the user back to the page listed.
- This is a web application. The web session will terminate automatically if there is no activity on the webpage for 20 minutes. A session is considered active if there is interaction with the web server, such as clicking **Next** or the **Submit** button. Typing in a text field does not count as being "active."

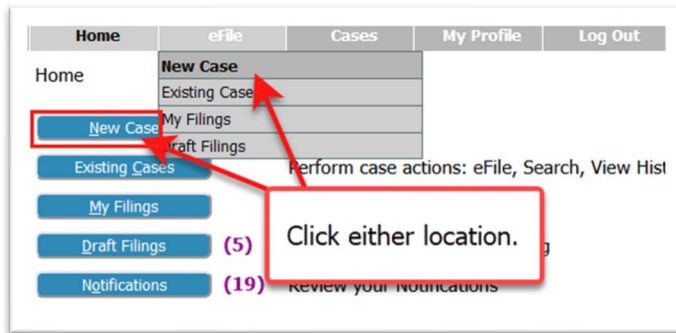
QUICK ACCESS BUTTONS ON THE HOME PAGE

New Case

INITIATING A NEW CASE

On the **Home Page**, click the **New Case** button. Alternately, hover over the **eFile Tab** on the **Menu Bar** and select **New Case** from the drop-down list.

Figure: Navigating to New Cases



1. Make a **Case Type** selection on the page.

THE CASE INITIATION PAGE

2. On the **Case Initiation page** the filer will be adding the Case Parties.
 - a) Click the **Add My Parties button** to be directed to the **Add a Party Page**.

Figure: Buttons to add Case Parties



3. On the **Add a Party page**:
 - a) Select the appropriate radio button for **Company** or **Person**.
 - b) Enter information in the **provided fields**. Fields with an asterisk* are required to proceed to the next page. You may opt to select an organization from the field **Pre-Existing Org**. This will auto-populate the fields with the system-recorded information.
 - c) For a case initiation, it is unnecessary to fill out the section **Add Representation for this Party** because the filing attorney will automatically be added as the attorney on the case.
 - d) If appropriate, click the **Add button** under the sections **Add Aliases (AKA)**, **Add Additional Addresses**, and/or **Add Additional Phones**. In the pop-up boxes, fill out the requested information and click **Save**.
 - e) Click **Next** at the bottom of the page to save your information. This will return you to the **Case Initiation page**.
4. On the **Case Initiation page**:
 - a) To add additional plaintiffs, click the **Add My Parties button** again and repeat the steps listed above.
 - b) Click the **Add Other Parties button**.
 - c) Create the profile following the steps outlined above.

- f) If the opposing attorney information is known, click the **Add button** under the **Add an Attorney for this Party** section.
- g) Choose to fill in either the attorney's last name, the bar number, or the organization. Click the **Search button** to see if this individual is recorded in the system.

Figure: Add Representation for this Party

Add Representation for this Party

One may enter information in one or more of the highlighted fields. Click Search.

Search Attorney

Last Name: Bar Number: Organization:

- h) The system will display possible matches, especially if the organization field has entered information. Mark the checkbox next to the correct attorney. This will enable the **SAVE button** to be clicked. **Click** to proceed.

Figure: Add Representation for this Party

Add Representation for this Party

Enter a Name. Click Search.

Select and Add Attorney(s)

	Title	Last Name	Middle Name	First Name	Suffix Name	Bar Number	Type	Address	Phone	FAX	Email	Organization
<input type="checkbox"/>	Mr.	Smith	M	Jay		AT0007387	undefined	PO Box 1194 Sioux City IA 51102 US	712-255-8094	712-255-3825	smitmcel@aol.com	SMITH & MCELWAIN LAW OFFICE
<input type="checkbox"/>	SBO/Business Manager	Smith					undefined	PO Box 430 Calmar IA 52132 US [Firm]	563-562-3269		ksmith@swinn.k12.ia.us	SOUTH WINNESHIEK COMMUNITY SCHOOL DISTRICT

Mark the checkbox next to the appropriate name.

- i) If there is not a match in the system, a red text message will appear. One may opt to skip the **Add an Attorney for this Party** section of the page, or choose to click the **Clear button** and proceed by clicking the **Add New Attorney button**.
- j) If you click the **Add New Attorney button**, the **Add/Edit New Attorney Details pop-up box** will appear. Fill in the fields with known information. Be aware of the required fields that have an asterisk*. Click the **Save button** at the bottom.
- k) Click the **Next button** at the bottom of the page to continue with the case initiation.

- l) View the case participants listed on the **Case Initiation page**. Click **X** to remove them. If edits are needed, click the case party's name and the system will direct you to the **Edit Party page**.
- m) Click **Next** to return to the **Case Initiation page**. Click **Next** again to proceed.

THE ADD A DOCUMENT PAGE

Figure: The Add a Document Page

Case Type : Amendment of Certification

Document Type *

Additional Text

☐ Sealed ☐ Confidential

Page Count

Acceptable File Format Type(s) (*.pdf)

Document Location

Add to Submission

Document Name	View Document	Edit Data	Size	Pg Count	Remove
Case Data	form.xml		0.01 MB		
Amendment Of Certification Petition	Dummy Doc.pdf		0.18 MB	1	
			Total Size: 0.18 MB		

Proceed.

- a) **Document Type field** - Select the appropriate document type from the drop-down menu.
- b) **Additional Text field**– If desired, enter text in this *optional field* to give greater detail to the document type. This description will ultimately display as part of the document listing in the official **Case Summary**.
- c) Mark the **Sealed** or the **Confidential privacy checkboxes** if appropriate to your filing.
- d) **Document Location** – Click the **Browse button** to locate and select the document from your computer. When the *title of the document* displays next to the **Browse button**, click the **Add button** to upload the selected document to the filing. (Each document uploaded to the system must be 10 megabytes or less. Multiple documents can be included in a single submission. The size limitation for an entire submission is **30 MB**.)

Figure: Document has yet to be added

Document Location No file selected.

Add to Submission

Figure: Document has been uploaded. Click Add.

Document Location MOTION.pdf

Add to Submission

- a) Add subsequent documents one at a time following the above steps.
- b) If you choose to remove a document from the document data table, click the **Remove icon** in the far right column.

- h) If you choose to finish the submission at a later time, click the **Move to Draft Button** at the bottom of the page. All data will be saved. (To retrieve the **Draft** later, hover over the **eFile tab** and select **Draft Filings**.)
- i) Click **Next** at the bottom of the page to proceed with the filing once all documents have been added.

THE REVIEW AND SUBMIT FILING PAGE

On this page, the filer may view, edit, add/or remove documents, go back to a previous page in the case initiation, cancel the filing, move the filing to the Draft page to act on it at a later time, or submit the filing to the court.

- a) **The Client #** - This optional field is listed only as a convenience to the filer who may have an internal office filing system to identify their clients. This number can be used to filter data on the **My Filings page** or the **Draft Filings page**.

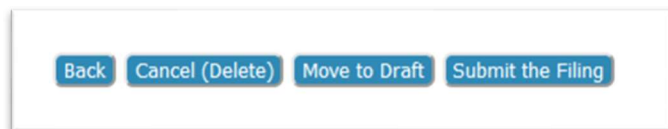
Figure: The Client # field



The screenshot shows a web form titled "Review and Submit Filing" in red text. Below the title, it says "Case Type : Amendment of Certification" in red. At the bottom, there is a label "Client #" in green next to a yellow rectangular input field. A red arrow points from the top right towards the input field.

- b) The **Change Case Data button** enables the filer to return to the **Case Initiation page** to view and/or edit case participant information.
- c) The **Add/Remove documents button** enables the filer to return to the **Add a Document page** to make any changes.
- d) Use the optional **Special Filing Instructions field** if you choose to make comments to the court. Any comments made will be *unofficial* and will not be recorded in the official **Case Summary**.
- e) Click the button **Submit the Filing**. You may also choose to select **Back, Cancel (Delete)** or **Move to Draft** as needed.

Figure: Buttons at the Bottom of the Review and Submit Filing Page



The screenshot shows a horizontal row of four blue buttons with white text. From left to right, the buttons are labeled: "Back", "Cancel (Delete)", "Move to Draft", and "Submit the Filing".

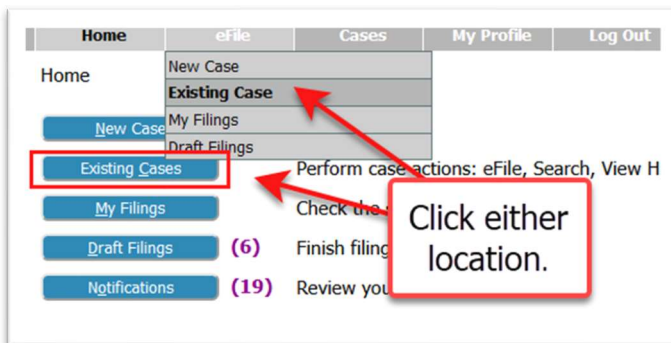
NOTE: When initiating a new case, the case will automatically be added to your “Cases” list. These may be view by hovering over the **Cases Tab** in the menu bar and selecting **Cases** from the drop-down list. The **Cases data table** is a useful resource to easily find case-relevant information.

Existing Cases

FILING TO AN EXISTING CASE

On the **Home Page**, click the **Existing Cases** button. Alternately, hover over the **eFile Tab** on the **Menu Bar** and select **Existing Case** from the drop-down list. This directs the user to the **Cases Page**. The **Cases page** not only allows a filer to efile to an existing case, it also gives the user easy access to cases, documents filed to the cases, and to the service list information associated to a particular case at the time of the query.

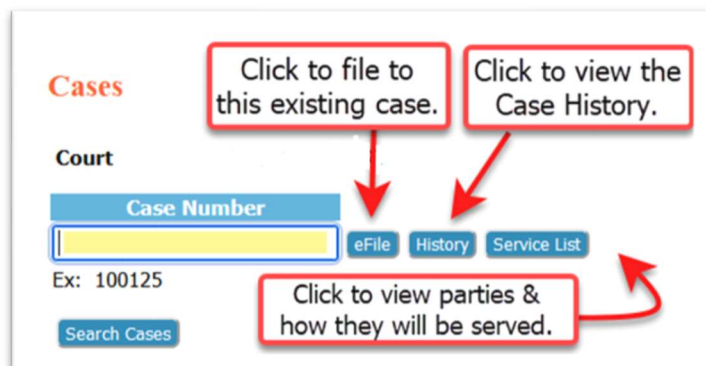
Figure: Navigating to the Existing Cases Page



THE CASES PAGE

1. The top portion of the **Cases page** displays a Case Number text field. Enter a case number and click one of the three buttons to its right:

Figure: Action Buttons on the Cases Page



- The **eFile button** - This button directs the user to the **Add-a-Document** page to proceed with a new filing.
- The **History button** - This opens a new browser tab and displays the **Case History**.
- The **Service List button** - This opens a new browser tab and identifies those case parties who will receive a filing's notification electronically or those who will need to be served in the traditional manner. (This list may change depending on when new filers request an eFiling account and gain access to electronic notification.)
- The **Search Cases button** is used to quickly locate one of your cases from within the **Case Data Table**. If you know either the **Case Title** or the **Case number**,

enter that information into the provided fields and click the **Search Button**. The system will search for the specific case and display it.

Figure: The Search Button to Find a specific Case inside the Case Data Table

Click the Search Cases button and a pop-up box will appear.

Fill in either field & click Search.

2. The bottom portion of the page displays the **Case Data Table**.

Figure: The Case Data Table

Click the hyperlink Case Number to open the Case Summary page for the case.

Click the eFile link to file to the case.

Click the hyperlink Service List to open the Certificate of Service page.

Click the radio buttons to help manage your Case Data Table.

Case Title	Case Number	eFile	Case Type	Judge	Court Location	Service List	Inactive
IN THE MATTER OF ROBERT BENNION	JD22-0001	eFile	Jud			Service List	<input type="checkbox"/>
SMITH, ANDREA V SMITH, ZACH	DIVSP22-0002	eFile	Div			Service List	<input type="checkbox"/>
JOHN, ROSS	CW054-15	eFile	Custody/Guardianship	Arthur Fisher		Service List	<input type="checkbox"/>
ANE DOORIN	CV22-0051	eFile	Civil			Service List	<input type="checkbox"/>
JONES V AHI	CV22-0012	eFile	Civil			Service List	<input type="checkbox"/>
0621-22	CV22-0008	eFile				Service List	<input type="checkbox"/>
CAT V. DOG	CV22-0007	eFile	Civil			Service List	<input type="checkbox"/>

- The data in each column has an ascending/descending sort feature that sorts alphabetically or numerically. Click the **column header** of choice to cause the table display to be organized according to the header selected. Clicking the column header a second time reverses the order of the displayed information.
- Hovering and pausing over any blue text hyperlink will pop-up a help guide for the user explaining what action will happen if you click on it.
- Clicking the **+sign** next to any listing in the **Case Title** column will *expand* the section and display the case documents. Clicking the **hyperlink Document Title** will open the document for viewing, printing, or saving. Clicking the **- sign** will *collapse* the section.
- Clicking the **hyperlink case number** in the **Case Number** column on the line of the intended case, will open a new browser tab and display the **Case Summary/History**, which includes case participant information and documents filed to the case. Clicking the **hyperlink document titles**

will display the document in its final state with the court-stamp on it as it is recorded permanently in the Case Management System.

THE CASE SUMMARY/HISTORY PAGE

Figure: The Case Summary/History Page

The screenshot displays the Case Summary/History page. At the top, case information is shown in a table:

Case Number	000082	Filing Party	AA BB
Case Type	Amendment of Certification	Responding Party	System Administrator et al
Opened	08-08-2014	Hearing Officer	Board Directly
Status	Closed		

Below this, there is a section for "Show/Hide Participants" and a "Case History" table. The "Case History" table has two columns: "File Date" and "Case History".

File Date	Case History
6-06-2020 03:15:21 PM PERB	Filed By: PERB PERB Correspondence Alpine G Test Filing.pdf
8-08-2014 12:31:38 PM	Filed By: PERB Election answer.pdf

Annotations with red boxes and arrows point to specific elements:

- "Case Info at the top." points to the case information table.
- "Click the expansion + sign to view case participants. Click again to collapse the section." points to the "Show/Hide Participants" link.
- "Click the blue text docket listing to open the court-stamped document." points to the blue hyperlinks in the Case History table.
- "This information section outlines what & when filings have been submitted to the court." points to the Case History table.

- Clicking the **eFile hyperlink** on the **Case History page** will direct the filer to the **Add a Document page** to proceed with a new filing to the existing case.
- Manage the data shown inside the **Case Data Table** by using the radio buttons: **Show Active**, **Show Inactive** and **Show Both** to set which cases will display. Marking the checkbox in the **Inactive column** gives the user the option to hide the case from view.

Figure: Radio buttons on the Cases Page

The screenshot shows three radio buttons for controlling which type of cases are shown in the Case Table:

Control which type of cases show in the Case Table by selecting the Radio button Active, Inactive or Both.

☒ Show Active ☐ Show Inactive ☐ Show Both

- Clicking the **hyperlink Service List** in the **Service List Column** opens a new browser tab and identifies those case parties who received a filing's notification electronically or by traditional means. (This list will vary depending on when new filers request an eFiling account and gain access to electronic notification.)

THE SERVICE LIST

Figure: The Service List

Certificate of Service	
Certificate of Service RE: 000082	
Case Number:	000082
Hearing Officer:	Board Directly
Case Processor:	Diana Machir
Board:	IOWA PUBLIC EMPLOYMENT RELATIONS BOARD IPERB
Case Title:	BB AND DD
This certificate was automatically generated by PERB's auto-notification system.	
Date Generated:	09-05-2024:04:43:03 PM
I hereby certify that on 09-05-2024, I electronically filed the foregoing with PERB by using the electronic filing system which will send a notice of electronic filing to the following:	
	Michael Williams for AA BB System Administrator
The following people need to be notified:	
	Board Directly CC DD Diana Machir

NOTE: Any user with a correct case number can efile on a case; however, users will not be to view a case history unless they are a party on the case or counsel of record.

FILING A NOTICE OF APPEARANCE BY AN ATTORNEY TO AN EXISTING CASE

- When an attorney files a **case initiation**, the system will *automatically* add them to the case as Counsel of Record. Through the system they will be able to access all case records (other than sealed documents), receive notifications of activity on the case, and view all filed documents to the case.
- When an attorney is counsel for the opposing party, after uploading their **Answer** or **Response** document, the system will direct them to a page where they enter in the **Answering Parties text field** the *name(s) of the case participant(s)* for whom they are filing and will be representing. This will associate the attorney to the case and through the system they will be able to access all case records (other than sealed documents), receive notifications of activity on the case, and view all filed documents to the case.
 - On the **Add a Document Page**, browse and select the appropriate **Answer or Response document** from your files.
 - Click the **Add button** to include the document as part of the submission.

Figure: Upload an Answer and Click the Add Button

Document Type * Answer

Additional Text

☐ Sealed ☐ Confidential

Page Count 2

Acceptable File Format Type(s)

Document Location Choose File Dummy Doc.pdf

Add to Submission Add

After uploading the ANSWER document to the page and clicking ADD, the system will direct the user to a "Notice of Appearance Page."

- c) The user will type the name(s) of the case participant(s) for whom they are representing.

Figure: The Answer page

Home » Cases » Add a Document » Notice Of Appearance

Prohibited Practice Complaint

100702 Case Title : AFSCME IOWA COUNCIL 61 AND CITY OF CLINTON

Add an Attorney for this Party

Last Name	Middle Name	First Name	Bar Number	Type
Williams		Michael	1234	Attorney

The information in this section will reflect the attorney logged into the system and e-filing the answer.

For

Participant Name	Current Role
<input type="checkbox"/> AFSCME IOWA COUNCIL	Filing Party
<input type="checkbox"/> City of Clinton	Responding Party

The attorney needs to mark the checkbox of the party on whose behalf they are filing.

Back Next

- d) Click the **Next** button to be directed back to the **Add a Document** page. Add additional documents to the filing, if desired, and click the **Next** button to proceed.

Figure: The Add a Document page

Document Type *

Additional Text

☐ Sealed ☐ Confidential ☐ Associate to Previous Filing

Page Count

Acceptable File Format Type(s) (*.pdf)

Document Location Choose File No file chosen

Add to Submission Add

Upload additional documents, if desired. Click the Next button to proceed to the Review & Submit page and submit the filing to the court.

Document Name	View Document	Edit Data	Size	Pg Count	Remove
Answer	Dummy Doc.pdf		0.18 MB	2	

Total Size: 0.18 MB

Back Move to Draft **Next**

Click to proceed.

- e) Complete the filing by clicking the **Submit the filing button** on the **Review and Submit Filing page**.
3. Other than filing an **Answer** Document type, an attorney who wishes to enter a case and have full access to the case records, receive notifications of activity on the case, and view all filed documents to the case, must file the document type **Notice of Appearance**. There are 2 options available within the system - one with a prepared document to upload and the other as a “documentless” filing.

Figure: The Notice of Appearance document type

- On the **Add a Document page** in the **Document Type field**, select **Notice of Appearance (with document)** from the drop-down menu.
- Click the **Browse button** to select the prepared document from your files.
- Click the **Add button** to include the document as part of the submission. This will direct the attorney to the **Notice of Appearance page** where the attorney will mark the checkbox next to the party on whose behalf they are filing the **Notice of Appearance**.
- Click **Next** and you will be directed back to the **Add a Document page**.

Figure: The Notice of Appearance page

- e) Add additional documents to the filing, if desired, and click the **Next button** to proceed.
 - f) Complete the filing by clicking the **Submit the filing button** on the **Review and Submit Filing page**.
4. If the attorney chooses instead to file the **Notice of Appearance (without document)**, select this option from the drop-down menu in the **Document Type** field.
- a) Click the **Add button**. (The Browse button will be grayed out and inaccessible). You will be directed to the **Notice of Appearance page** where you mark the checkbox next to the party on whose behalf you are filing the **Notice of Appearance**.
 - b) Click **Next** and you will be directed back to the **Add a Document page**.
 - c) Add additional documents to the filing, if desired, and click the **Next button** to proceed.
 - d) Complete the filing by clicking the **Submit the filing button** on the **Review and Submit Filing page**.

My Filings

CHECKING THE STATUS OF A FILING

On the **Home Page**, click the **My Filings** button to be directed to the **My Filings page**. Alternately, hover over the **eFile Tab** on the **Menu Bar** and select **My Filings** from the drop-down list.

Figure: Navigating to the My Filings Page

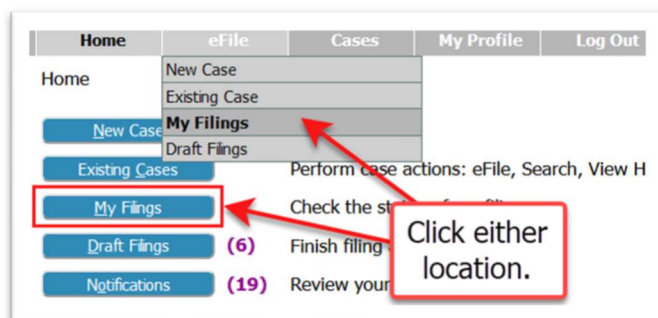
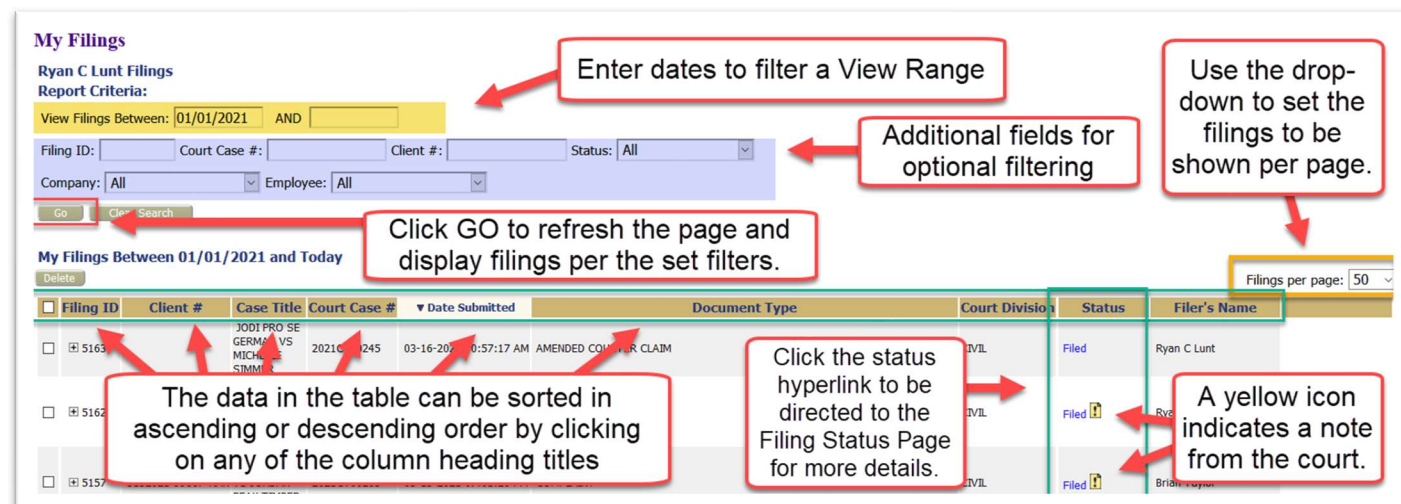
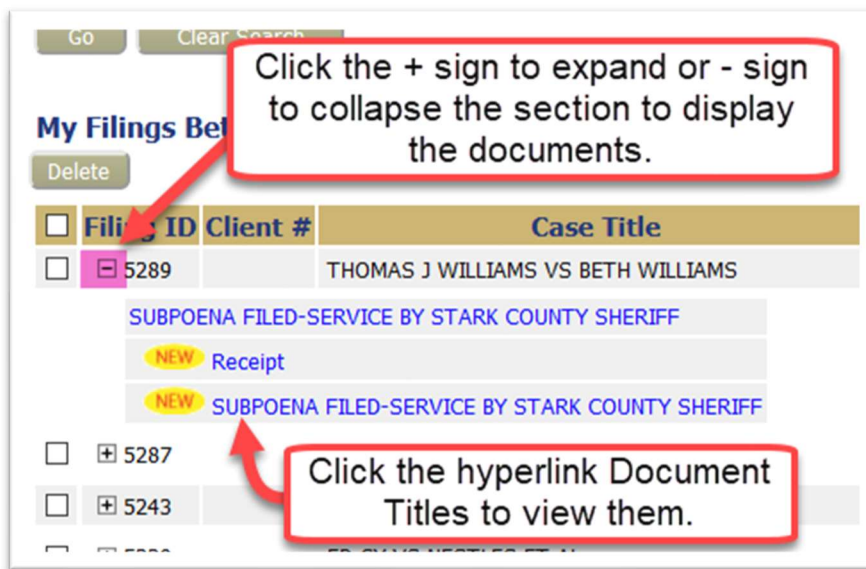


Figure: Overview of My Filings Page



1. Use the *filtering fields* at the top of the page to narrow your search: Filing ID, Court Case #, Status, or Client # (This number corresponds to the *optional client # field* on the **Review and Submit page**. It is offered as a convenience to the filer if they have an internal filing system related to their clients. It is not a number used by the eFiling system.) For the fields **View Filings Between**, set the date to include the date of submission. Click **Go** to refresh the page and locate the submission listing.
2. **Column headers** in the data table have an ascending/descending sort feature that sorts alphabetically or numerically. Click the **column header** of choice to cause the table display to be organized according to the header selected. Clicking the **column header** a second time reverses the order of the displayed information.
3. The default column for the data table is the **Date Submitted column**, which means the most recent filings will be at the top. This is recognized by the block color difference of the column header that is controlling the data display. If another column is selected for filtering, this will become the new default setting for the session. If you leave the page and return again in the same time session, it will stay as the default setting. However, if you logout or the session terminates because of inactivity, when you log back in, the setting will refresh and the **Date Submitted** will once again resume as the default column header.
4. Clicking the **+ sign** in the **Filing ID column** *expands* the section and displays the documents in the filing. Click the **- sign** to *collapse* the section. To view the documents, click their **hyperlink name**.

Figure: The + sign expands & collapses



5. When viewing the expanded section after clicking the **+ sign**, if **Receipt** is one of the documents displayed, this means the filing has been processed and its status is **Filed**. The Receipt document is the **Confirmation of Receipt** document sent to the filer from the court. Click its *hyperlink* to open a new browser tab to view or print this document.
6. The right column is the **Status column**. This column allows the filer to follow the progress of the filing through its various stages of processing. Some statuses happen so quickly that each stage may not

visibly be tracked. Clicking the **Go button** will refresh the page view and post any changes in the status. Once it has been completely processed, the Final state is **Filed**.

Other statuses include:

- **Received** - The submission has received a time stamp and will be placed in a queue for further processing.
- **Awaiting Approval** - The submission is in a queue for further processing.
- **Receipt Pending** - An error occurred in communications. Call the e-Filing administrator.
- **Rejected** - Submission was denied. See the note from the clerk for an explanation. To start the resubmission process, click **Resubmit**.
- **Filed** – The final status of the filing. No further action. The filer should look at their case history or receipt of the submission to download signed documents and check for notes from the Clerk.
- **Accepted-Presented to Judge** –Accepted and routed to a Judicial Queue for a judge to review. This means that even though the submission has been filed, the proposed document may not have been reviewed at this time, but it has been presented to a judge.
- **Resubmitted** - This submission was “Rejected,” and the filer used the old submission to create a new submission. The status of this submission has no future value, and the filer needs to look at the new submission status.

THE FILING STATUS PAGE

7. The **status** listed in the **Status Column** is a hyperlink. Click to be directed to additional information.

Figure: The Hyperlink Status on the Filing Status Page



Court Division	Status	Filer's Name
CIVIL	Filed	Miranda Gross

8. The top portion of the **Filing Status Page** displays specifics associated to your filing – the filing ID, tracking ID, the individual who submitted the filing, the date submitted, the official file stamp, the case title, case number, case type, and court division.

Figure: Top Portion of the Filing Status Page



Filing Status

Status: [Filed](#) 02-02-2021:09:36:13 AM

Client #:

Filing ID: 4830

Tracking ID: 3448

Submitted By: Williams, Lisa M.

Date Submitted: 02-02-2021 09:35:53 AM

Official File Stamp: 02-02-2021 09:35:53 AM

Case Title: JERRY DAUGHERTY HASHMAN VS HEARTLA

Court Case #: 2020CV00200

Case Type: Workers Compensation

Court Division: CIVIL

9. The Documents, as filed in the original submission, will display in the section with the column headings **Document Name** and **View Document**. These documents do not have the court's time and date stamp.

Figure: Bottom Portion of the Filing Status Page

Document Name	View Document
CASE MANAGEMENT ORDER	generated.pdf
- Document Form Data	XML Data
Form Data	Generated XML Data

Documents submitted with the Filing. Click to View.

Response Document Name	View Document
Receipt	receipt.html
CASE MANAGEMENT ORDER	generated.pdf

Court's response, including time/date stamping. Also Confirmation of Receipt.

Click hyperlinks to View or Print.

[Back](#)

10. Below the horizontal line is the **Response section**, meaning the response from the court. This section displays the documents *after* they have been processed with the court's time and date stamp on them. When applicable to the document type, it will also have the court's electronic signature. Click the documents' hyperlink listings to display the document in a newly opened browser tab. Any document that is listed as *generated.pdf* is a system-generated document. Do not open the *form.xml* link as this is simply computer code that the system administrator can use for information should troubleshooting be necessary.
11. If the filing status shows **filed** on the **My Filing page**, the **Confirmation of Receipt** is available on this page.

CONFIRMATION OF RECEIPT

The **Confirmation of Receipt** is the Court's official notification that the submission was received. Click the **hyperlink receipt.html** to open a new browser tab to display the **Receipt**. It is recommended that you print or save a copy for your records because documents will be removed from your Filer Interface periodically as determined by the court.

Figure: The Confirmation of Receipt

Confirmation of Receipt

The following information confirms acceptance of your filing by Stark County Clerk of Courts

Case Information

Case Caption: JERRY DAUGHERTY HASHMAN VS HEARTLAND BEHAVIORAL
Case Number: 2020CV00200
Case Type: Workers Compensation
Judge: CHRYSSA N. HARTNETT
Court: Stark County Common Pleas Court

Filing Information

Filer: Lisa M. Williams
Official File Stamp: 01-27-2020:12:00:00 AM
Filer Interface Id: 4830
Clerk Interface Id: 3448

Payment Information

Payment Method: None Specified
Deposit Amount: \$0.00

Documents

generated.pdf: CASE MANAGEMENT ORDER

This is the Court's official notification that the submission was received by the court.

12. If the filing's status shows **rejected** on the **My Filing page**, the *reason* for the rejection will post on the **Filing Status page**. Understanding what is missing or incorrect about their filing, the filer will be able to correct and resubmit the filing.

Figure: The Reason a filing was rejected shows on the Filing Status page

Filing Status	
Status:	Rejected 04-05-2021:03:15:18 PM
Reason:	The wrong document was submitted with your filing. Please correct and submit again.
Client #:	
Filing ID:	5290
Tracking ID:	3842
Submitted By:	Lunt, Ryan C
Date Submitted:	04-05-2021 03:14:06 AM
Official File Stamp:	
Case Title:	ED GY VS NESTLES ET AL
Court Case #:	2021CV00301
Case Type:	Workers Compensation
Court Division:	CIVIL

HOW TO RESUBMIT A REJECTED FILING

1. If the clerk rejects a filing, they are instructed to enter a note for the filer to explain the reason why. With these instructions, the filer can correct the filing and resubmit it. The system flags the filer of the note by displaying an *exclamation point inside a yellow rectangle* on the **My Filings page**. Clicking the *hyperlink status* of the **Rejected**, listed under the **Status Column**, the user will be directed to the **Filing Status page** where they may read the note written by the clerk. Sometimes this note is a message generated by the system.
2. The system will also generate a “one-time-use” **Resubmit button** which will display to the right of the status column on the **My Filings page**.

Figure: The Rejected and Resubmit Buttons

Status	Filer's Name	
Rejected 	Ryan C Lunt	Resubmit

Click to read the note from the clerk as to why.

Click to correct filing & resubmit.

3. Click the **Resubmit** button. This will cause the eFlex system to *clone the information* from the rejected submission and route the user to the **Add a Document page** where the user can make the necessary corrections to the filing and proceed to resubmit the filing back to the court.
4. After the corrections have been made on the **Add a Document page**, click **Next**.
5. The filer will be directed to the **Review and Approve Filing page**. Click **Submit**.
6. The **Filing Status page** will now display a **Resubmitted status** for the first filing and will create a new data line for the resubmitted filing.

Figure: The Data Table showing the Resubmitted Status

Court Division	Status	Filer's Name
CIVIL	Filed	Ryan C Lunt
CIVIL	Resubmitted	Ryan C Lunt

The listing shows the filing was resubmitted.

The resubmitted filing will have its own FILED status line.

Draft Filings

INCOMPLETE FILINGS

On the **Home Page**, click the **My Filings** button to be directed to the **My Filings** page. Alternately, hover over the **eFile Tab** on the **Menu Bar** and select **My Filings** from the drop-down list.

Figure: Navigating to the Draft Filings page



During the process of creating a filing, a filer may need to stop their work, save it, and continue their filing later. The **Save to Draft** button, located at the bottom of each filing page, is used for this purpose.

Figure: The Move to Draft Button at the Bottom of an interface Page

Document Location

Browse...

No file selected.

Add to Submission

Add

	Document Name
	APPEARANCE

Back

Move to Draft

Next

To retrieve the Draft later, click the **Draft Filings Button** or select from the **Menu Bar**. A list of any partially completed submissions will display in a data table. To proceed, click the *hyperlink Description* in the **Description column** on the line of the filing you intend to complete. The system will direct you to the **Add a Document page**.

Figure: Click the Hyperlink Description to Proceed with the Draft Filing

Draft Filings							
Delete							
Filing ID	Client #	Court Case #	Case Title	Description	Create Date	Court Division	Days Until Deletion
4868		2021CV00128	RONNY DONALDSON VS PROFESSOR CAR REPAIR	Contract Case	02-04-2021 06:05:16 PM	CIVIL	

NOTE: Be aware that the filing draft will only display on the **Draft Filings page** for a limited time before it is automatically deleted. The time varies from 60-90 days depending on the court's specifications.

Notifications

HOW TO VIEW NOTIFICATIONS

On the **Home Page**, click the **Notifications Button** to be directed to the **Notifications page**. Alternately, hover over the **Cases Tab** on the **Menu Bar** and select **Notifications** from the drop-down list. If there is a number in parentheses next to the **Notifications** button, this indicates how many “unread” notifications currently exist. This page is where the filer may read the “**official**” **notifications** from the court.

In addition to **official notifications**, the eFlex system sends **courtesy email notifications**, to communicate with the eFiling account user when filings are submitted on their cases. Email notifications are considered **courtesy notifications** only because emails can be lost, they can get blocked by spam, or filer may have issues on their end with their email server. These circumstances are out of the control of the eFiling system. For this purpose, the official notifications come through the Filer Interface. These notifications can be tracked by the clerk to ensure that everyone has been served electronically. All email addresses entered in their profile will receive the email messages. There are 3 types of email notifications sent:

- Received Notice – This states that their submission was *received* by the court.
- Accepted Notice – This states that their submission was *accepted*, or approved and recorded by the court.
- Courtesy NEF – The “NEF,” which means *Notice of Electronic Filing*, identifies document(s) that were filed to the court and which case participants received electronic notification through the eFiling system and which participants need to be served in the traditional manner. Addresses for the latter are included for mailing purposes. **NOTE:** Once you have efiled on a case and have been added as a party to that case by the clerk of court, your username will be associated with that case. When someone else sends a follow-up submission on any case on which you have been indexed as a participant, you will receive a *courtesy email* of this action and an *official notification* on your **Notification page**.

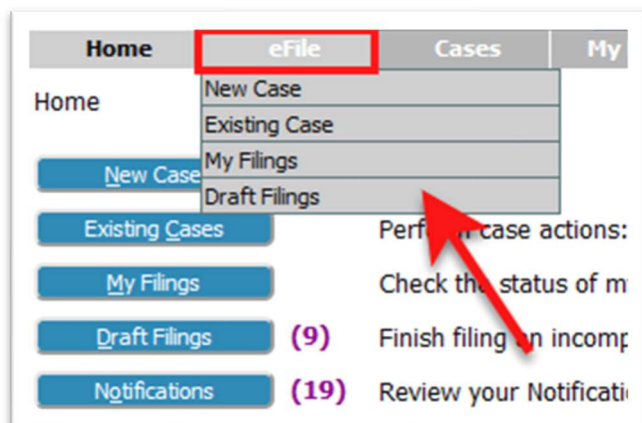
NOTE: For participants on the case that *do not* have an eFiling account, it is required of the eFiling user to continue the practice of service to those participants via paper and to include the **Certificate of Service** as part of the documents in the filings.

1. Use the two **Search By fields** at the top of the page to filter the display of information in the **Notifications Data Table**. In the left field, select a search category from the drop-down menu: Notification ID, Description, Case Title, Case Number, or Court Division. In the right field, enter the corresponding information. Click **Go** to *initiate the Search*. Clear the filtering fields by clicking the **Clear Search button**.
2. The data in each column has an ascending/descending sort feature that sorts alphabetically or numerically. Click the **column header** of choice to cause the table display to be organized according to the header selected. Clicking the column header a second time reverses the order of the displayed information. This is a useful tool when searching through a lengthy data table.
3. Notifications that *have not* been read will have a bolded heading in the **Document(s) filed by** column and a closed envelope to the left of the **Notification ID**.
4. Clicking the **hyperlink Document Title** will open a new browser tab to display the *official* NEF, or *Notice of Electronic Filing*.
 - a) The top of the NEF contains case-related information, including **document(s) filed**.
 - b) The bottom portion of the NEF indicates the **service requirements** at the time the listed document was submitted. (Future or past submissions may have different service requirements.)
 - c) Persons with eFiling accounts being served electronically are listed first on the NEF.
 - d) Persons still requiring service by traditional means are listed under the second heading.
5. Notifications that *have* been read will have an unbolded title with an opened envelope.
6. Users may use the buttons **Mark as Read** and **Mark as Unread** to manually change the display of the envelope.
7. To view the document(s) within the filing, click the **hyperlink document title** listed under the
8. **NEF title** in the **Documents(s) filed by column**. The time-stamped document will display as a pdf. It is recommended that users download hard copies for their records.
9. The number of notifications shown per page can be adjusted by selecting another menu option from the **Notifications per page** drop-down field. It is located on the right above the Data Table.
10. The system is coded to auto-clean the notifications after a set period of time as determined by the court. Users can manually clean the page by marking the checkbox on the far left of each filing's listing in combination with the delete button.

MENU TABS ACROSS THE TOP OF EACH INTERFACE PAGE



Figure: The eFile Tab and its Drop-down Menu



The selections available to the Filer under the **eFile Tab** are:

NEW CASE –

Selecting **New Case** from the drop-down menu under the **eFile Tab** takes the user to the same page as if they had clicked the **New Case quick access button** on the **Home Page**. It directs the user through the process of selecting Court, Division, Case Category, Case Type, Case Initiation, Adding Parties, Adding Documents and ending with the Review & Submit Page before sending the case initiation filing to the court. Because the Menu Bar is available on every page, it is not necessary to return to the **Home Page** to click the **New Case Button**.

EXISTING CASE -

Selecting **Existing Case** from the drop-down menu under the **eFile Tab** takes the user to the same page as if they had clicked the **Existing Cases quick access button** on the **Home Page**. It directs the user to the **Cases page**, where they can choose to efile, view a Case History, or view the current Service List which identifies which case parties will receive an NEF and which ones must be notified by a traditional method of service.

MY FILINGS -

Selecting **My Filings** from the drop-down menu under the **eFile Tab** takes the user to the same page as if they had clicked the **My Filings quick access button** on the **Home Page**. It directs the user to the **My Filings page** where they can get an overview of all their filings. This includes checking the current status of their filings, viewing and printing the court-stamped documents that were submitted with their filings, and viewing and printing the **Confirmation of Receipt**.

DRAFT FILINGS -

Selecting **Draft Filings** from the drop-down menu under the **eFile Tab** takes the user to the same page as if they had clicked the **Draft Filings quick access button** on the **Home Page**. It directs the user to the **Draft Filings page** where a table of partially completed filings may be viewed. To proceed with any one of them, click the *hyperlink Description* and it will direct you to the **Add a**

Document page. If edits need to be made on the **Case Initiation page**, press the **Back** button to be directed there. Continue with the usual steps for filing to a new or existing case and submit the filing to the court.

OVERVIEW OF THE NEW CASE PAGE

Selecting **New Case** from the drop-down menu under the **eFile Tab** takes the user to the same page as if they had clicked the **New Case quick access button** on the **Home Page**.

See page 13 to review this information.

OVERVIEW OF THE EXISTING CASE PAGE

Selecting **Existing Case** from the drop-down menu under the **eFile Tab** takes the user to the same page as if they had clicked the **Existing Cases quick access button** on the **Home Page**.

See page 17 to review this information.

OVERVIEW OF THE MY FILINGS PAGE

Selecting **Existing Case** from the drop-down menu under the **eFile Tab** takes the user to the same page as if they had clicked the **My Filings quick access button** on the **Home Page**.

See page 23 to review this information

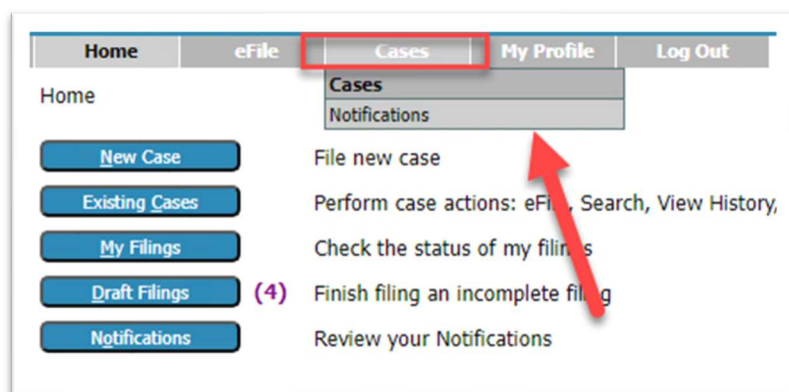
OVERVIEW OF THE DRAFT FILINGS PAGE

Selecting **Existing Case** from the drop-down menu under the **eFile Tab** takes the user to the same page as if they had clicked the **Draft Filings quick access button** on the **Home Page**.

See page 28 to review this information



Figure: The Cases Tab and its Drop-down Menu



The selections available to the Filer under the **Cases Tab** are:

CASES –

Selecting **Cases** from the drop-down menu under the **Cases Tab** takes the user to the same page as if they had clicked the **Existing Cases Button** on the **Home Page** (see pg. 17.). It directs the user to the **Case page** where a case data

table, made up of the user's own cases, can be searched to view individual cases in greater detail. Here they can efile to one of their own cases or any other existing case, view case histories and documents on cases in which they are council of record, or see the service list information associated to one of their cases at the time of the query.

NOTIFICATIONS – Selecting **Notifications** from the drop-down menu under the **Cases Tab** takes the user to the same page as if they had clicked the **Notifications Button** on the **Home Page** (see pg. 29). It directs the user to the **Notifications page** where they can view the official **NEF**'s received from the court as well as see all the court-stamped documents of filings that any party of their cases have made.

OVERVIEW OF THE CASES PAGE

Selecting **Cases** from the drop-down menu under the **eFile Tab** takes the user to the same page as if they had clicked the **Existing Cases quick access button** on the **Home Page**.

See page 17 to review this information.

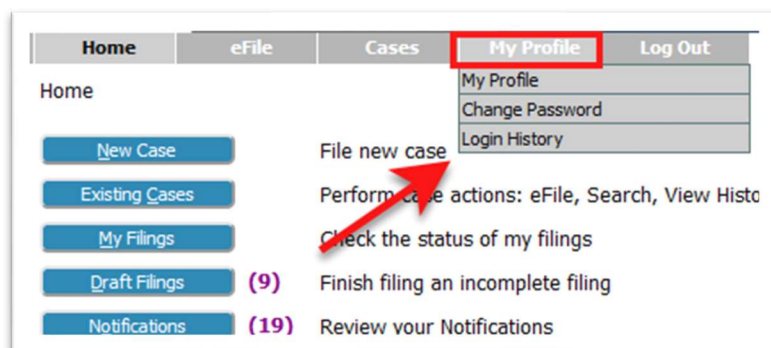
OVERVIEW OF THE NOTIFICATIONS PAGE

Selecting **Existing Case** from the drop-down menu under the **eFile Tab** takes the user to the same page as if they had clicked the **Notifications quick access button** on the **Home Page**.

See page 29 to review this information



Figure: The My Profile Tab and its Drop-down Menu



The selections available to the Filer under the **My Profile Tab** are:

MY PROFILE - Selecting **My Profile** from the drop-down menu under the **My Profile Tab** takes the user to the **User Profile page**, which displays the user account information that was provided when the user account was created or modified.

CHANGE PASSWORD – You may change your password whenever desired. Periodically changing of your account password is a wise security measure. We recommend that your password be something that you can remember, but is difficult for others to figure

LOGIN HISTORY –

out. A strong password has symbols, upper and lower case characters, and numbers. Passwords are case sensitive.

For security reasons, the system keeps track of every attempted login to your account. It will show the date and time of the attempted login, the login result and the requesting IP address. If you notice any unusual activity in this Login History, change your password or notify your IT department. With the IP address, they can determine if it was within your company or an external IP address, and who might be trying to log in as you. Changing your password on a regular basis is one way to help avoid unauthorized access to your account.

OVERVIEW OF THE MY PROFILE PAGE

When you register for an eFiling account, you are required to provide profile information, which can be edited or updated later as needed.

1. Hover over the **My Profile Tab** and select **My Profile** from the drop-down menu. The **User Profile page** will appear and display the information entered when the user account was created or modified.
2. To change the information in the user profile, click the button **Modify User Profile**. This will direct the user to the **Modify User Profile page**. Fields that display a textbox may be modified.

Figure: The Modify User Profile Button

User Profile

Brian Taylor

User Name: btaylor
 Organization: TYBERA DEVELOPMENT GROUP
 Bar Number: 0006431
 User Identifier:
 Phone:
 Fax:
 EMail: btaylor@tybera.com
 1st Alternate EMail:
 2nd Alternate EMail:
 Address: 563 East 770 North
 Orem, UT 84097
 US
 Role: Attorney
 Date Approved: Not Available
 Expiration Date:
 Lockout Date:

Modify User Profile **Change Password**

NOTE: It is important that the primary email associated with this account is kept up to date as that is the way the eFlex system communicates with you about activity that has taken place on your cases. If you change your email account and do not record the new email on your user profile, you will no longer receive NEF's (Notifications of Electronic Filing) for your cases.

3. *Optional:* The alternative email addresses are provided so that someone else, in addition to yourself, may also receive your courtesy email notices. This may be used for partners or assistants.

4. *Optional:* Email Notifications, by default, are programmed to be sent to users to notify them that their filing has been received by the court, that their filing has been approved and recorded by the court, and when their filing has been rejected. Filers may choose to opt out of these *courtesy emails* and instead rely exclusively on the *official notifications* that come to their Notifications page inside the Filer Interface. To discontinue these status update emails, select the appropriate radio buttons under the **Email Notification section** on the **Modify User Profile page**.
5. Click Submit to save the changes you have made and be returned to the **User Profile page**.

NOTE: If modifications need to be made to information on the **Profile page** that does not appear to be editable, such as the organization to which the user is associated, the user will need to contact the system administrator for assistance.

OVERVIEW OF THE CHANGE PASSWORD PAGE

Figure: The Change Password Fields

1. Hover over the **My Profile Tab** and select **Change Password** from the drop-down menu. Alternately, there is a **Change Password button** on the **User Profile page**.
2. Enter the current password in the **Password field**.
3. Create a new password following the password requirements and type it into the **New Password field**.
4. In the **Confirm New Password field**, re-type the password exactly as you entered it in step 3.
5. Click **Submit** to save your changes.
6. Be sure you notify your legal assistant, or any others who may enter your filings for you, of the change to your password.

NOTE: When you are changing your password using the **Forgot My Password feature** on the log-in page, make sure in the first password field that you type the *new temporary password* given you in the email. Don't try to remember your former old password because that information is no longer applicable.

OVERVIEW OF THE LOGIN HISTORY PAGE

1. Hover over the **My Profile Tab** and select **Login History** from the drop-down menu.
2. The **Login History page** appears displaying a list of the login attempts along with the date, login result, and IP address of the requesting machine.

Figure: The Login History Page

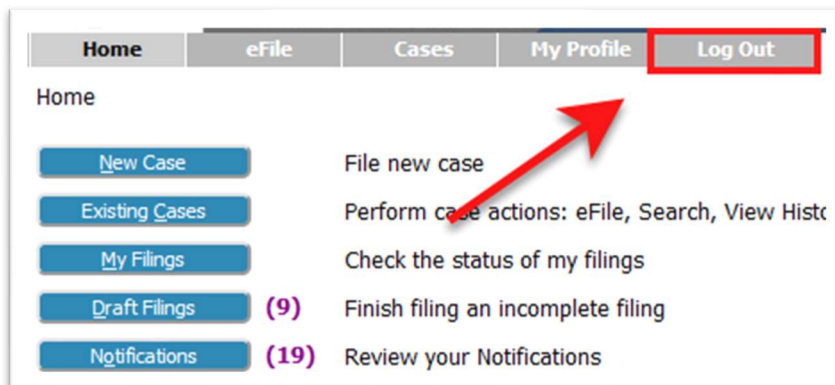
Login History		
Mark Klein Log In History		
Employee Account Status: Active		Entries per page: 50 ▾
Date Logged In	Log In Result	Requesting IP Address
2021-03-11 15:39:50.0	Succeeded	192.168.247.151
2021-03-04 12:36:12.0	Succeeded	192.168.247.151
2021-03-04 12:23:07.0	Succeeded	192.168.247.151
2021-02-24 10:03:19.0	Succeeded	192.168.247.151
2021-02-24 09:51:24.0	Succeeded	192.168.247.151
2021-02-23 08:20:36.0	Succeeded	192.168.247.151
2021-02-22 15:19:09.0	Succeeded	192.168.247.151
2021-02-22 13:43:24.0	Succeeded	192.168.247.151
2021-02-04 13:34:32.0	Succeeded	192.168.247.151
2021-01-07 10:33:49.0	Succeeded	192.168.247.151
2020-12-29 14:51:17.0	Succeeded	192.168.247.151

3. If you want to see more entries per page, change the value in the **Entries per page** drop-down field.



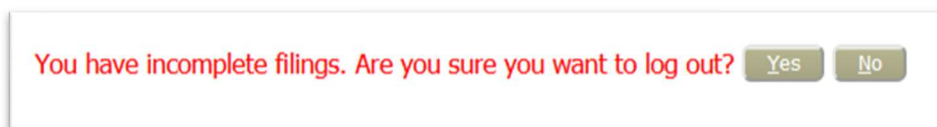
OVERVIEW OF THE LOG OUT PROCESS

Figure: The Log Out Tab



1. To log out and terminate the current session to the server, click **Log Out** on the **Menu Bar**.
2. If there are currently any incomplete filings on the **Draft Filings page**, a red text message will appear to alert the user of this status. This courtesy notification allows the filer to complete any filings that they perhaps thought they had already submitted to the court.

Figure: Notification to the Filer



3. Review the list of incomplete filings that have yet to be submitted to the court. These filings include those the Filer purposely postponed by clicking the **Move to Draft button** as well as any the system automatically added. (The eFlex system automatically executes a save action on incomplete filings when a user selects **Logout**.) Click the **hyperlink Description** of any listing to continue with the filing. The system will direct the user to the **Add a Document page** where documents may be added or changed. Click **Next** to proceed to the **Review and Submit page** and to submission.
4. As a reminder, eFlex is a web application. The web session will terminate automatically if there is no activity on the webpage for 20 minutes. A session is considered active as long as there is interaction with the web server, such as clicking **Next** or the **Submit** button. Typing in a text field does not count as being “active.” If a user leaves their computer and returns in a hour, for example, the screen may appear the same as when they left; however, when they click on a field to proceed, the system will log out and take the user to the **Login page**.